Voluntary Deductions

Overview

Introduction   This guide provides the procedures for how to view, change, add or stop members' Voluntary Deductions (Allotments). This component is used for the following types of voluntary deductions:
- Additional MGIB
- Association Dues
- Combined Federal Campaign Fund
- Commercial Insurance
- Loan
- Mutual Assistance Donation
- Mutual Assistance Loan
- Navy Mutual Aid Insurance
- Other Allotment
- Private Venture Housing
- Repay home loans, mortgages
- Savings
- Support of Dependents
- Treasury Direct Savings

Contents

Adding a Voluntary Deduction
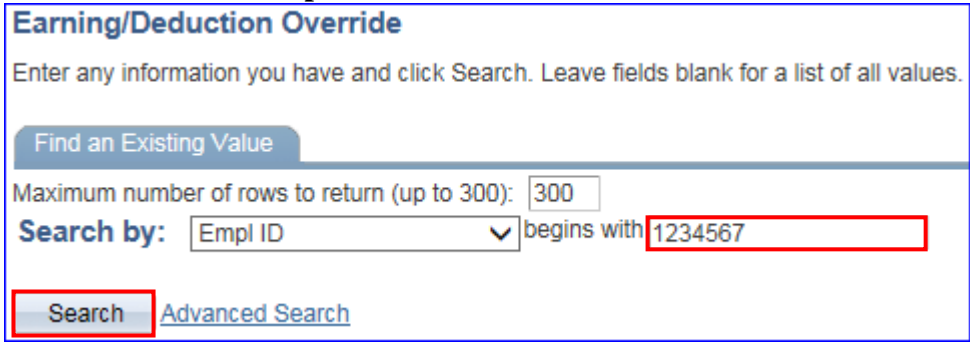
Introduction   This section provides the procedures for how to add a Voluntary Deduction for a member.

Before you begin   The start date for all allotments must always be the first of the month. If starting an allotment during a mid-month calendar (1st through 15th), the start date will default to the first of the current month. If starting an allotment during an end-month calendar (16th through 30th), the start date must be greater than or equal to the first of the next month.

Procedures   See below.

Step	Action
1	Select the **Voluntary Deductions** link from the Active & Reserve Pay Shortcuts Pagelet.
2	Enter the member's **Empl ID**. Then click **Search**.

Adding a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
3	The member's current allotments (if any) will be listed. Select the **Add Deduction** link to add an allotment.

Adding a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
4	Review the bullets and click on the **Processing Schedule link** before proceeding. When finished, select a **Deduction** from the drop-down.

Ace Ventura ....   Empl ID 1234567   Empl Record   0

Enter Allotment information:

- Allotments for current month can be started or changed prior to current mid month payroll cut. Click on the Processing Schedule link to determine the mid month payroll cutoff dates.
- Allotments can be started or changed for future month.
- If you want to stop your allotment immediately, press the Stop Deduction button below. If pressed prior to end-month Compute cutoff, your stop will be effective at the end of the prior month (any deductions from your mid-month pay will be refunded in your end-month pay). If pressed after end-month Compute cutoff, your stop will be effective at the end of the current month.
- If you want to stop your allotment during a future month, or at the end of the current month, you can stop the allotment by entering an End Date below and then pressing the Save Deduction button.
- Allotments must be set up for payment by direct deposit / electronic funds transfer.

Deduction: [_____ ▼]

Amount: [_____]

Begin Date: 12/01/2014 🗓   **Type:**

End Date: [_____] 🗓   **Policy #:** [_____]

Once the deduction is selected, enter the following:

- **Amount:** This field is required for all allotment types. Enter the amount in dollars and cents. Do not enter a dollar sign.

   Example: Ten dollars and fifty cents is entered as 10.50. Upon saving, the amount will change to 10.500000. This is the default PeopleSoft format for fields holding monetary information.

- **Begin Date:** This field is requited for all allotment types and is automatically defaulted to the earliest month the member may start the allotment. This date can be changed to a future date. The Begin Date must always be the 1st of the month.

- **End Date:** With the exception of CFC and CGMA Loan allotments, this field is not required to be completed. However, it may be completed if the member wants the allotment to automatically stop on a known date. The End Date must always be the last day of the month.

- **Type:** An option must be selected when Association Dues and Loan deductions are chosen.

- **Policy:** This field auto-populates for some deduction choices and can be entered for others. For Private Venture Housing, enter the member's SSN here.

Procedures, continued

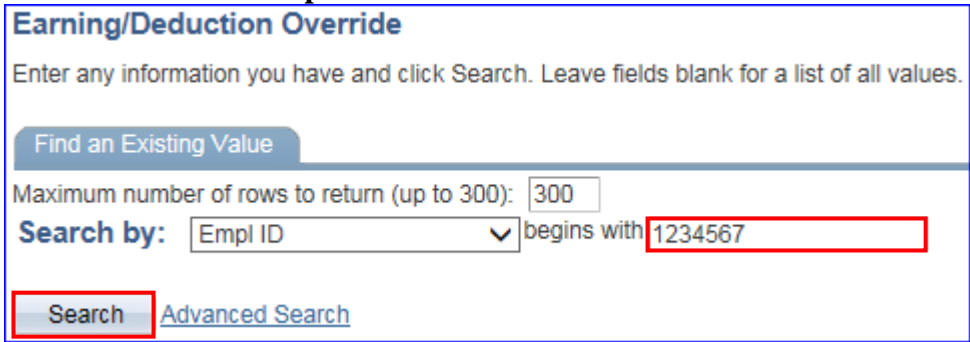| Step	Action
5	The **Recipient** and other fields will auto-populate for the following deductions: Additional MGIB, Mutual Assistance Donation, Mutual Assistance Loan, Navy Mutual Aid Insurance and Private Venture Housing. For CFC, use this link to find the blanket recipient code: http://www.uscg.mil/ppc/da/cfc.pdf. If the **Recipient** field is not used, complete the remaining fields. When entering the **Account Number**, the number **must** start completely aligned to the **left** of the block (make sure there are no spaces before the number). It is recommended that the Account Number is not copied and then pasted into the block. Now click **Save Deduction**.
6	After saving, the list of allotments will be updated.

Changing a Voluntary Deduction

Introduction   This section provides the procedures for how to change the Amount or End Date of a Voluntary Deduction for a member. Changes to account names and account types are not allowed on existing allotments. If one of these need to be changed, stop the allotment and restart it with the new information.

Procedures   See below.

Step	Action
1	Select the **Voluntary Deductions** link from the Active & Reserve Pay Shortcuts Pagelet.
2	Enter the member's **Empl ID**. Then click **Search**.

Changing a Voluntary Deduction, Continued

Procedures, continued

Step	Action
3	The member's current allotments will be listed. Select the **Pencil** under Edit, to edit the allotment.
4	The details for the allotment will display. If changing the allotment: ▪ **Amount:** This field is required for all allotment types. If changing the amount during a mid-month calendar (1st through 15th), the change date will default to the first day of the current month. If changing the amount during the end-month calendar (16th through 30th), the change date must be greater than or equal to the first of the next month. Enter the amount in dollars and cents. Do not enter a dollar sign. Example: Ten dollars and fifty cents is entered as 10.50. Upon saving, the amount will change to 10.500000. This is the default PeopleSoft format for fields holding monetary information. ▪ **Routing/Account #:** The change date must be greater than or equal to the first of the current month no matter which pay calendar it is entered. **End Date:** The End Date must be the last day of the month.
5	Click the **Save Deduction** button at the bottom of the page.

Changing a Voluntary Deduction, Continued

Procedures, continued
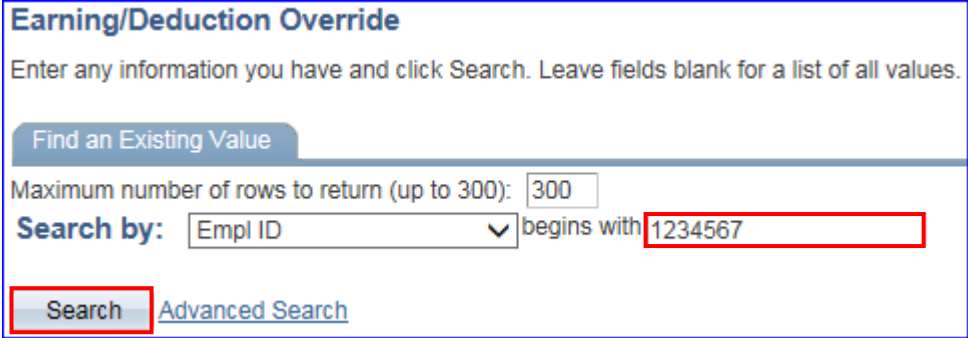
Step	Action
6	The allotment summary page will display. Verify the allotment change appears on the list correctly. If there is an error, click the **Edit** icon (pencil), correct it and save the deduction again. **Ace Ventura** Empl ID 1234567 Empl Record 0 The payee's allotments are listed below: • To add an allotment, click the Add Deduction link. • To edit an allotment, click the Edit icon beside the allotment you want to update. • Dependent Dental Plan and Federal Long Term Care Insurance Program (FLTCIP) allotments cannot be edited. **Deductions** <table><tr><th>Element</th><th>Amount</th><th>Begin Date</th><th>End Date</th><th>Recipient</th><th>Edit</th></tr><tr><td>Savings</td><td>$75.000000</td><td>03/01/2015</td><td></td><td>Savings Account</td><td>✎</td></tr><tr><td>Tricare Dependent Dental</td><td>$32.890000</td><td>07/01/2014</td><td></td><td>METLIFE DENTAL PROGRAM</td><td></td></tr><tr><td>Savings</td><td>$50.000000</td><td>01/01/2014</td><td>02/28/2015</td><td>Savings Account</td><td>✎</td></tr></table> Notice the original Savings allotment automatically has an End Date and the updated amount is listed at the top.

Stopping a Voluntary Deduction

Introduction   This section provides the procedures for how to stop a Voluntary Deduction for a member.

Procedures   See below.

Step	Action
1	Select the **Voluntary Deductions** link from the Active & Reserve Pay Shortcuts Pagelet. **Active & Reserve Pay Shortcuts** Email Address — Direct Deposit Proxy - Submit Absence Request — Voluntary Deductions SGLI + FSGLI — Maintain Tax Data USA Accrue Pay — Housing Allowance Dependent Information — Cost of Living Allowance ACIP — MGIB Enrollments Sea Time Balances — View Payslips (AD/RSV) Net Distribution — Hire Applicant Proxy Member for eResume — Add Employment Instance Job Data — Modify a Person Add a Person
2	Enter the member's **Empl ID**. Then click **Search**. **Earning/Deduction Override** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Maximum number of rows to return (up to 300): 300 **Search by:** Empl ID begins with 1234567 Search Advanced Search

Procedures,
continued

Step	Action
3	The member's current allotments (if any) will be listed. Select the **Pencil** under Edit, to edit the allotment.

Stopping a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
4	The allotment detail page will display. Deduction: Savings Amount: 115.000000 Change this deduction on: 12/01/2014 End Date: There are two ways to stop an allotment: 1. Enter an End Date in the End Date field and click the Save Deduction button at the bottom of the page. Enter the last day of the month the allotment deduction shall be made. For example, if the member wants the last allotment payment to be made one 1 March 2015 payday, enter 02/28/2015 as the End Date and click **Save Deduction**. Verify the allotment stop date appears in the end date column correctly. If there is an error, click the **Edit** icon (pencil), correct it and save the deduction again. **Deductions** | Element	Amount	Begin Date	End Date	Recipient	Edit
---	---	---	---	---	---
Mutual Assistance Donation	\$2.000000	06/01/2002		Cg Mutual Assistance Campaign	✎
Savings	\$1420.000000	10/01/2012		ACE VENTURA	✎
Tricare Dependent Dental	\$32.890000	01/01/2014		METLIFE DENTAL PROGRAM	
Savings	\$115.000000	12/01/2014	02/28/2015	SNOWFLAKE	✎	 2. To stop an allotment **immediately**, click **Stop Deduction** at the bottom of the page. If stopping an allotment during the mid-month calendar, the stop date will default to the last day of the previous month. If stopping an allotment during the end-month calendar, the stop date will default to the last day of the current month. The **Stop Deduction** can also be used to "delete/Undo" a pending allotment. For example, if an allotment is input with a Start Date of 02/01/2015, and then prior to the end-month February payroll finalize date, the member decides he/she does not want the allotment to start, click the **Stop Deduction** button. This will stop/swap the allotment effective 01/31/15, and the allotment will be deleted from the Allotment Summary page. When the Stop Deduction button is used on an existing allotment, it will be removed from the Allotment Summary page.